Introduction

The quadrennial international interlibrary loan survey is one of the fundamental, core charges of the American Library Association (ALA) Reference & User Services Association (RUSA) Sharing and Transforming Access to Resources Section (STARS) International ILL Committee. The survey was first undertaken in 2007, with the current (2023) survey being the fifth iteration. The 2023 survey was distributed globally in collaboration with the International Federation of Library Associations and Institutions (IFLA) Document Delivery and Resource Sharing Section (DDRS), and was the first survey to be made available in all seven official IFLA languages (i.e., Arabic, Chinese, English, French, German, Russian, and Spanish).

The 2023 survey instrument utilized the Qualtrics platform and was built upon the 2019 and 2015 instruments, with the majority of questions from those prior surveys retained in order to facilitate longitudinal comparison. The committee began their work on the 2023 survey in earnest in the summer of 2022. They refined the text of specific questions to make them as
clear and accurate as possible and reached out to language experts to provide the most understandable translated versions. The committee also discussed which questions should be withdrawn from the instrument and what new ones should be added.

Suggestions made in the 2019 survey executive summary for modifications and additions to the survey were incorporated into the 2023 survey. Questions which had not yielded actionable data were removed, and new questions aimed at gleaning information regarding the impact of the COVID-19 pandemic on libraries' international interlibrary loan operations were added.

The survey was distributed via listservs, library contact information gleaned from the International ILL Toolkit, and social media to institutions in over 85 countries. The survey was open for twelve weeks from June 14, 2023 to September 10, 2023.

2023 Responses and Demographics

- 269 respondents to 2023 survey
- 143 responses (53%) from North America, which was an increase from prior iterations (33% in 2019, 28% in 2015 and 47% in 2011).
- Six countries represented for the first time: Cambodia, Kazakhstan, Mozambique, Nigeria, Peru, Trinidad & Tobago.

Comparison to Prior Surveys

<table>
<thead>
<tr>
<th>Year</th>
<th>Respondents</th>
<th>Countries</th>
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<tbody>
<tr>
<td>2023</td>
<td>269</td>
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1 Please note: Individual questions in the survey had differing numbers of respondents, and the number of responses for each particular question will be designated as “n=” in this report, in order to best provide readers with a response rate context for that question. For example, a question with 123 respondents would be noted as (n=123). Additionally, certain questions allowed respondents to supply more than one answer to the question. Those types of questions are noted as “Select all that apply”, thus responses will not add up to 100% in such instances.
The majority of respondents (210 responses) used the English language version of the survey (78%). This was the first survey iteration where all seven official IFLA languages were offered.

- 59 of 269 (22%) of respondents used one of the non-English survey translations.
- Every translation was used, with Spanish 10% (27) being used the most often.
- The largest number of responses were from institutions in North America 53% (143), followed by Europe 31% (83), Asia 6% (15), Australia and Oceania 5% (14), Africa 3% (8), and Central or South America, Caribbean 2% (6).
On nearly every continent, a plurality of respondents worked in academic libraries. The exception was Australia and Oceania where more medical/health libraries responded than other library types (43% medical/health, 29% academic).
### Response by Continent, Country, and Library Type (n=269)

<table>
<thead>
<tr>
<th>Continent/Country/Library Type</th>
<th>Responses</th>
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## Response by Continent, Country, and Library Type continued (n=269)

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2023 Quantitative Data

Borrowing Responses of Particular Interest

● “Does your library borrow internationally?” (n=266)
  ○ 72% (192) borrow internationally
  ○ Variance by continent for international borrowing among survey respondents: Europe (83%), Central or South America (80%), Australia and Oceania (71%), North America (69%), Asia (50%), and Africa (43%)
  ○ Among those libraries which do not borrow internationally, the top reasons were “not required for our patron needs” (15), “cost prohibitive” (14), and “shipping difficulties” (12)

● What type² of materials does your library borrow internationally? (n=168)
  ○ 80% (134) borrow both returnables and non-returnables from other countries
  ○ 19% (32) borrow non-returnables only
  ○ 1% (2) respondents indicated they borrowed returnables only

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² In this report the term **returnable** refers to materials that must be returned to the lending library at the end of the loan period, e.g., a book. The term **non-returnable** refers to materials that the requesting institution or local user can keep, e.g., a scan of an article.
Most common annual volume for international ILL borrowing\(^3\) reported was “fewer than 100 per year” for both returnables 63% (103) and non-returnables 59% (96). This is true across most continents, with the following exception:

- Returnables: from Australia and Oceania 56% indicated “None”, while 33% chose “Fewer than 100” (note: there were only 9 respondents for this question from Australia and Oceania).

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\(^3\) To be clear, in the chart “International ILL Borrowing Volume (12 month)” above, the “n=” numbers refer to the number of respondents that answered the question: “What is your library's 12-month international borrowing volume?” 163 respondents provided their returnables volume, while 164 respondents provided their non-returnables volume.
Fluctuations in international borrowing volume: 24% (38) reported an increase as compared to five years ago, 41% (65) reported a decrease, and 35% (56) reported no change. Most common reasons for changes:

- Top reasons cited by those who reported an **increase** in borrowing volume: More international lenders available 26% (23), Users discovering more international materials 17% (15).
- Top reasons cited by those who reported a **decrease** in borrowing volume: Shipping costs are too expensive 16% (23), Alternatives to resource sharing (e.g., Sci-Hub, #icanhazPDF) 14% (20).
Which, if any, types of materials are especially hard to obtain from international collections? Select all that apply. (n=150)

- Hard to obtain materials:
  - Copies of rare or older material 55% (83)
  - Electronic books 55% (83)
  - Theses and dissertations 41% (62)
  - **E-Journal articles** were cited as hard to obtain in a majority of the “Other” responses (9 out of 14).

- Hard to obtain materials as indicated by respondents from each continent:
  - Africa: Copies of rare or older material 100% (3)
  - Asia: Copies of rare or older material 83% (5)
  - Australia and Oceania: Copies of rare or older material 70% (7)
  - Central or South America: Electronic books 100% (2), Theses and dissertations 100% (2)
  - Europe: Electronic books 63% (37)
  - North America: Copies of rare or older material 53% (37)

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4 Please note: **respondents were able to “Select all that apply”, allowing them to supply multiple answers**, thus percentages do not add up to 100%. In all cases with questions where respondents were able to give more than one answer to a specific question (“Select all that apply” or open questions where respondents could supply multiple answers), the percent given is the **percent of respondents** who gave that answer to the query.
• From which countries does your library borrow most heavily?
  ○ 47 different countries were selected by 161 respondents, with Germany 60% (96), United Kingdom 41% (66), Canada 37% (60), United States 36% (58), France 27% (44), and Italy 20% (32) being the most commonly chosen.
    ▪ Africa: United Kingdom (2), United States (2), Australia (1), France (1), Lesotho (1), Switzerland (1)
    ▪ Asia: United States (5), China, People’s Republic (2), Singapore (2), United Kingdom (2)
    ▪ Australia and Oceania: United States (9), Germany (6), New Zealand (6), United Kingdom (3), Belgium (2), Canada (2)
    ▪ Central or South America: United States (2), Argentina (1), Chile (1), India (1), Spain (1)
    ▪ Europe: Germany (44), France (29), Italy (25), United States (24), Austria (18)
    ▪ North America: Canada (55), United Kingdom (46), Germany (45), Australia (24), United States (16)

Local Patron Charge (International ILL)

<table>
<thead>
<tr>
<th>Charging local patrons for international ILL borrowing requests:</th>
</tr>
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<tbody>
<tr>
<td>○ 51% (118) of respondents do not charge local users for international ILL of <strong>returnables</strong>.</td>
</tr>
<tr>
<td>○ 54% (126) of respondents do not charge for international ILL of <strong>non-returnables</strong>.</td>
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</tbody>
</table>
By way of context, 61% of respondents indicated that they do not charge local users for domestic returnables, and 65% do not charge local users for domestic non-returnables.

Lending Responses of Particular Interest

- "Does your library lend internationally?" (n=238)
  - 71% (169) lend internationally
  - Variance by continent for international lending among responding libraries: Central or South America 100% (3), Europe 83% (62), North America 70% (87), Africa 57% (4), Asia 50% (7), Australia and Oceania 43% (6)
  - The most common reasons given among respondents that do not lend internationally (n=51) were cost (19) and not receiving ILL requests from abroad (9).

- What type of requests will your library supply internationally? (n=165)
  - 78% (128) of respondents lend both returnables and non-returnables abroad
  - 22% (36) supply non-returnables only
  - 0.61% (1) supply returnables only

Annual Volume for International ILL Lending
Most common reasons for lending volume change:

- Amongst libraries which saw an increase in volume, Change in availability of holdings information 26% (24) was the top reason given, followed by Change in ability to lend due to the pandemic 18% (16).
- Amongst libraries which saw a decrease in volume, Increasing availability to free online content and local access via subscriptions to electronic content 26% (24) was the top reason cited and marked a newly added choice in the 2023 survey.
- Shipping costs are too expensive 17% (16) was the second top reason for a decrease in request volume, and represented a change in wording from the 2019 survey (previously: “Change in shipping costs”).

Respondents were asked to compare their lending volume with 2019 (pre-COVID): “Does your library fill more or fewer international interlibrary loan requests now than five years ago? What has the change been?”

- 91% (149) of respondents indicated they supply non-returnables electronically, up from 84% in the 2019 survey.

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5 To be clear, in the chart “International ILL Lending Volume (12 month)” above, the “n=” numbers refer to the number of respondents that answered the question: “What is your library’s 12-month international lending volume?” 157 respondents provided their returnables volume, while 160 respondents provided their non-returnables volume.
Top methods of supplying non-returnables electronically in 2023: PDF attachment via email (77), OCLC Article Exchange (72), Odyssey (27), Web Delivery (26), Rapid (13)

Among respondents, libraries in Australia and Oceania (100%), Central and South America (100%), North America (98%), Europe (84%), Asia (80%), and Africa (67%) are most likely to lend electronically.

- **Do copyright restrictions** prevent your library from supplying non-returnables to international borrowers? (n=163)
  - 34% (56) answered that copyright was a barrier, 53% (86) indicated that it was not an impediment, and 13% (21) answered “I don’t know”.
  - Variance by continent for libraries which indicated that copyright was an impediment to supplying non-returnables: Asia 80% (4), Europe 55% (33), Australia and Oceania 50% (3), Central or South America 33% (1), Africa 33% (1), North America 16% (14). The response rate on this question was low outside of North America and Europe.

- **Do licensing restrictions** prevent your library from supplying non-returnables to international borrowers? (n=151)
  - 16% (24) answered “Yes”, licensing restrictions are an impediment
  - 16% (24) answered “No”, licensing restrictions are not an impediment
  - 68% (103) answered “Depends on the license agreement for individual title or electronic collection” (a new choice added in 2023 and far and away the most common response)
  - “Depends on the license agreement for individual title or electronic collection” is the most common response across most continents (response rate on this question was low outside of North America and Europe): Africa 67% (2), Australia and Oceania 83% (5), Europe 70% (40), North America 68% (54).
The primary method of shipping returnables internationally is essentially evenly split amongst: Courier (DHL, FedEx, UPS, etc.) 29% (46), Expedited postal service 29% (45), and regular postal service 28% (43). The majority of “Other” responses were from libraries who replied that they did not supply returnables abroad.
● **Resource sharing system or network** (such as OCLC, Alma, Rapid etc.) was the most common method noted for receiving international lending requests 77% (125), followed closely by Email 70% (114), while locally hosted web forms were used by 25% (40) of respondents.

● “Identify up to 5 countries to which your library most frequently lends (returnables and non-returnables)”
  ○ 62 different countries were selected by 150 respondents. Most commonly chosen: Canada 48% (72), United States 31% (46), United Kingdom 30% (45), Australia 23% (35), France 21% (32), and Germany 21% (31).
    ■ Africa: Botswana (2), South Africa (2), United States (2)
    ■ Asia: China, Hong Kong (4), China, Taiwan (2)
    ■ Australia and Oceania: New Zealand (4), United States (3), United Kingdom (2), Australia (1)
    ■ Central or South America: United States (2), Argentina (1), India (1)
    ■ Europe: France (27), United States (27), Italy (23), Germany (20), Austria (15), Spain (13)
    ■ North America: Canada (64), United Kingdom (35), Australia (28), Denmark (18), Korea, Republic of (12)
- IFLA vouchers are currently the most widely accepted payment mechanism for international transactions 70% (110), followed by three electronic payment methods: OCLC IFM 50% (81), credit cards 22% (34), and bank transfers 17% (27). Half of all “Other” responses (13) indicated that they supplied free of charge.

- Would your library use electronic IFLA vouchers (if they existed) to facilitate international interlibrary loan? (n=160)
  - 67% (107) said they would use electronic vouchers, if they were available
  - Libraries that currently use physical IFLA vouchers and would use electronic vouchers: 57% (91)
  - Libraries that don’t use IFLA vouchers and would use electronic: 10% (16)
  - Libraries that currently use IFLA vouchers and would not use electronic: 11% (18)
  - Libraries that don’t use IFLA vouchers and would not use electronic: 20% (35)
2023 Open Responses

Why do you think the number of international interlibrary loan borrowing requests has changed? Select all that apply. (n=160)

- No change
- Change in availability of international lenders
- Other
- Change in users discovering international
- Change in shipping costs
- Alternatives to resource sharing
- Prefer to purchase rather than borrow new titles
- Change in local policies

Number of Respondents

The most common answer was from institutions that saw no significant change in international ILL borrowing (47), followed closely by Change in availability of international lenders (44), and Alternatives to resource sharing choice, such as accessing via Sci-Hub or #icanhazPDF, amongst other gray market routes (26).

Amongst the reasons most often cited in the Other responses were: Expansion of resource sharing platforms (9), Patron needs changed (8) and the pandemic (6).
Many libraries appear to request from wherever the item is located without regard to national borders, but especially from established overseas partners or networks. Consequently, this also speaks to the importance of discovery in order to locate holding libraries in the first place.
Respondents denoted that licensing terms restrict not only what they can lend, but also to whom and where they can lend and even how the content can be shared.

Why, if at all, does your library charge additional fees for international lending services? (n=68)
When asked why they charge more to lend internationally, a respondent from Europe summed up a common theme: "Because shipping costs are much higher, especially for overseas deliveries."

A theme emerged across all responses that **international borders should not be barriers** to filling requests for your own users or filling from your own collections to other libraries' users. In other words, you go where and when you have to.
Several themes for improvement emerged: budgetary (decreased costs); ease and speed of delivery for both returnables (faster shipping, improved customs process) and non-returnables (electronic delivery); improved means of discovery; broader resource sharing networks; and facilitation of payment (such as via electronic IFLA vouchers). Several respondents specifically cited the International ILL Toolkit as a valuable resource for help with some of these issues. As a library from the United States noted, “We do already rely heavily on [the] International ILL Toolkit with listings of libraries and example emails in other languages.”

- Has your interlibrary loan office undertaken efforts to improve or expand international borrowing/lending in the past five years? (n=158)
  - 38% (60) answered Yes. The most often mentioned ways that libraries took to enhance their international interlibrary loan activities were:
    - New or broader use of a resource sharing platform (18)
    - Policy changes designed to increase international ILL (10)
    - Use of the International ILL Toolkit (6)
What international interlibrary loan challenges did your institution experience at the height of COVID-19? (n=126)

- Library closure: 48
- Limited access to physical collection: 24
- Suspension of lending returnables: 17
- Delayed mail service: 14
- Staff issues (shortage/remote work): 12
- Increased requests for non-returnables: 12
- Suspension of all ILL service: 12
- Customs issues: 6

**Lack of access**, whether to the closed libraries themselves 38% (48), or specifically to the print collections 13% (17), or the ability to lend returnables 13% (17), were noted as primary challenges faced by institutions and individuals during the height of COVID.
Although some challenges faced during the height of the pandemic have been ameliorated, respondents noted many which remain as barriers to international interlibrary loan. Shipping problems, such as increased costs as well as slower delivery times, were the most commonly cited challenges at 31% (23). A shortage of resources, whether it was lower staffing or a decreased budget (or both), was cited by 15% (11) of respondents. As a university library in North America commented, “Our budgets have consistently shrunk, making international loans not an option.” The challenge of libraries not yet back as active lenders was noted as a continuing issue by 12% (9) of respondents.
Not surprisingly, alleviation of budget and staffing woes topped the list of responses for what resources would help overcome continuing challenges. Another strong theme is the call for additional e-resources that are shareable (by law or by license) via interlibrary loan. “Implementing the capability to offer complete eBooks through interlibrary loan would be a tremendous leap forward in assisting our users,” advocated one university library from the United Kingdom of Great Britain & Northern Ireland.

Better resources for holdings discovery, resource sharing information (such as whether libraries were willing to supply returnable or non-returnables, how to request from them, how to pay them, and means of requesting in their native language), and shipping and customs information were also highly sought. Numerous respondents declared that they found the International ILL Toolkit to be of help in many of these regards and declared the hope that it would continue and grow. As a university library in the United States noted, “The [International] ILL Toolkit is very helpful, so for that to continue would be great.”

There were also calls for growth of resource sharing networks, better international payment options, and investigation of controlled digital lending (CDL) for international interlibrary loan.
When asked how the pandemic specifically impacted their international interlibrary loan volume, there was a clear indication from the 144 responses that returnables had dropped off with 84 libraries noting a decrease in borrowing and 64 noting a decrease in lending. A shift was seen in terms of an increase in the requests for non-returnables, with 53 respondents indicating an increase in borrowing and 56 an increase in lending.

Reflecting current interest in the resource sharing community, respondents were asked, “Is your institution interested in conducting Controlled Digital Lending (CDL) internationally?” There was a strong response rate of 213 answers, with a fairly even split amongst the answers: Yes (76), No (74), and Other (63). In terms of those respondents who answered No, the greatest number indicated they were simply not interested (37), followed by those who currently had insufficient staffing in order to facilitate smooth running of a CDL operation (26). Libraries also brought up additional roadblocks to usage of CDL, whether they felt they were legally unable to supply via CDL (20), or else that they currently lacked the technology to do so successfully (17). Out of the 63 who answered “Other”, the most common response was that they “did not know” (28), followed by those who were somewhat interested, but not in the immediate future (12).

At the close of the survey respondents were asked if there was anything else that they wished to share with the committee regarding international interlibrary loan. The most common answers revolved around the value of international resource sharing, regardless of volume (21% of respondents), and the importance of promoting international cooperation (17%). "It is really
amazing to be part of the ILL community, and even more so when that extends globally,” noted a respondent from a North American academic library.

**Longitudinal Comparison (2015-2023)**

Delivery methods

What is your library's primary method for shipping returnables internationally?

- **2015**
- **2019**
- **2023**

- Courier
- Expedited Postal Service
- Regular Postal Service
- Other

0% 10% 20% 30% 40% 50%
Does your library deliver non-returnables electronically to international libraries?

Payment methods

Which of the following methods does your library accept as payment for lending materials to international libraries? (Select all that apply.)
Conclusions

The state of international interlibrary loan remains strong, although admittedly with some portions of the globe more active and more connected than others. An important task moving forward will be breaking down these regional silos and forging deeper resource sharing connections. There is also a renewed awareness of the importance of alternatives to print access and continued difficulties with the loaning of physical items, such as high shipping costs or the complexity of international customs regulations. The importance of negotiating licensing agreements which allow international supply via interlibrary loan from e-resources continues to grow. Similarly, more libraries are investigating the possibilities of utilizing Controlled Digital Lending (CDL) to augment, or as an alternative to, the shipping of physical books internationally. Difficulty with international payments might be alleviated with the introduction of an electronic version of the widely-used IFLA voucher, and the committee recommends that the IFLA Document Delivery and Resource Sharing Section (DDRS) investigate the possibility of creating such functionality to facilitate the international payment process.

Budgetary concerns and the accompanying staffing shortages were also frequently cited impediments for both borrowing and lending internationally. Many survey respondents noted the importance of resource sharing networks, making connections outside of one’s own region, and finding resources to aid in both discovery and requesting. The International ILL Toolkit and the
new IFLA RSCVD app are two resources whose continued growth and development can serve to aid in discovery, requesting, and in helping make connections across borders.

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Respectfully submitted,
STARS International Interlibrary Loan Committee
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